BARBARA L. PRICE LTD.

CHARTERED PROFESSIONAL ACCOUNTANT

P.O. Box 263, Unit #2 - 175 Second Ave W, Qualicum Beach, BC V9K 1S8
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2019 PERSONAL TAX SLIP CHECKLIST

Name: _____ Spouse's name: _____

INCOME

- ☐ T3 - Estate, trust, mutual fund income
- ☐ T4 - Employment income
- ☐ T4 (OAS) - Old Age Security
- ☐ T4A (P) - CPP benefits
- ☐ T4A - Other pensions and annuities
- ☐ T4E - Employment Insurance Benefits
- ☐ T4RSP - RRSP income or withdrawals
- ☐ T4RIF - RRIF income or withdrawals
- ☐ T5 - Interest and dividends
- ☐ T5007 - Social assistance
- ☐ T5007 - Workers' Compensation Benefits
- ☐ T5008 - Statement of securities transactions
- ☐ T5013 - Partnership income - details

- ☐ Business / Professional & Rental income / expenses ***(see the Business and Rental Income Checklist)***
- ☐ Capital gains (please indicate the cost and proceeds of any asset dispositions)
- ☐ Commission income
- ☐ Farming activities income / expenses
- ☐ Foreign pension or other income
- ☐ Other currency, cryptocurrency, bitcoin transactions
- ☐ Sales or deemed sales of stocks, bonds or real estate
- ☐ ***Tip income*** or other employment income not on T4
- ☐ Miscellaneous or other income, spousal support received, death benefits, etc.

OTHER DOCUMENTATION

- ☐ Details of change of address
- ☐ Sale OR ***change in use*** of ***principle residence details***, it MUST be reported on your return even if not taxable
- ☐ Details of ***specified foreign property*** including shares of US or other foreign countries held in a non-registered Canadian investment account with a total cost of more than $100,000 CAD at any time during the year
- ☐ Did you receive interest, dividends, or benefits from a private corporation or trust which ***you inherited*** or in which a ***relative is a key party*** (in terms of ownership or involvement) which are not exempt from TOSI (tax on split income)?
- ☐ Income tax instalments
- ☐ Dependant's name, SIN #, birthdate and income
- ☐ Details of change in marital status

NEW CLIENTS

- ☐ Last year's T1 Notice of Assessment
- ☐ Last year's tax return
- ☐ Do you authorize CRA to provide information about you to Elections Canada? (Check for 'YES')
- ☐ List of countries of citizenship (Note - we do not provide US tax services)

DEDUCTIONS AND CREDITS

- ☐ T101 - Flow-through shares
- ☐ T2202 - Tuition receipts T101
- ☐ T5013A - Tax Shelter write-offs

- ☐ Adoption expenses
- ☐ BC Senior's Home renovation tax credit receipts (these may also qualify for the Home Accessibility tax credit)
- ☐ Caregiver for any family member - details
- ☐ Carrying charges and interest expenses (to earn investment income)
- ☐ Charitable & political donation receipts
- ☐ Child care expenses (SIN #, Name and Address of Caregiver)
- ☐ Disability tax credit (if a new claim Form T2201 required)
- ☐ Eligible Educator School Supply tax credit receipts
- ☐ Employment related expenses (Form T2200 required)
- ☐ Exploration and development expenses
- ☐ Home accessibility tax credit receipts
- ☐ Interest paid on student loans
- ☐ Medical expense receipts (or summary) – ***recommendation obtain annual summary from your pharmacy, dentist, insurance claims provider, etc.***
- ☐ Medical travel receipts (or summary) ** include doctor's referral or appointment confirmation
- ☐ Moving expenses (>40km for employment or school)
- ☐ Northern resident deductions
- ☐ Purchase of new construction home or first home - details
- ☐ RRSP contribution receipts
- ☐ Spousal support paid / Alimony
- ☐ Stock option and share deductions - details
- ☐ Tool expenses (Tradespersons Form T2200 required)
- ☐ Volunteer Firefighters certification
- ☐ Volunteer Search & Rescue certification
- ☐ Union or professional dues – receipt

Tax payments deadline for all taxpayers is April 30, 2020

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2019 PERSONAL TAX – BUSINESS and RENTAL INCOME CHECKLIST

Name: _____ GST #: _____

Business name: _____ Business Phone number: _____

Business address: _____ Business Email: _____

_____ Business Website: _____

Would you like an excel schedule to organize your tax information? Please call the office (250) 752-7072

INCOME

- ☐ Business income – farming, fishing, professional, commission
- ☐ Partnership income – provide your % partnership interest, partner's name, address and SIN #
- ☐ Rental income – provide details of your % ownership and name, address and SIN #'s of all joint or co-owners
- ☐ Proceeds received on sale of any assets; vehicles sold

EXPENSES

- ☐ Provide receipts for property, equipment and other capital assets purchases
- ☐ Inventory value December 31 $_____
- ☐ Cost of goods sold including inventory purchases
- ☐ Operating expenses
  - ☐ Advertising
  - ☐ Bad debts (uncollectible accounts)
  - ☐ Business taxes, fees, licences, dues, memberships and subscriptions
  - ☐ Delivery, freight and express
  - ☐ Fuel costs (excluding automobile)
  - ☐ Insurance - business
  - ☐ Interest – business loans
  - ☐ Maintenance and repairs
  - ☐ Management and administration fees
  - ☐ Meals and entertainment
  - ☐ Office expenses
  - ☐ Supplies
  - ☐ Legal, accounting and professional fees
  - ☐ Rent and property taxes (excluding business use of home)
  - ☐ Salaries, wages and benefits (include T4's)
  - ☐ Travel (excluding automobile)
  - ☐ Telephone (excluding business use of home)
  - ☐ Utilities (excluding business use of home)

GST / HST

- ☐ Indicate if GST/HST returns to be filed by our office

INTERNET BUSINESS ACTIVITIES

- ☐ Earn income from webpages or websites?
- ☐ Provide list of Top 5 webpages or websites from where you earn business income
- ☐ Provide the % of income generated from internet

AUTOMOBILE EXPENSES

- ☐ Total km driven in the year for business or employment, supported by mileage log _____
- ☐ Total km driven in the year _____
- ☐ For ***new businesses*** or ***newly acquired*** vehicles, make, model and year of vehicle
  - ☐ Market value, if owned $_____
  - ☐ Lease or financing agreement
- ☐ Expenses
  - ☐ Car washes
  - ☐ Gas and oil
  - ☐ Insurance, licence and registration
  - ☐ Interest paid on money borrowed to purchase automobile
  - ☐ Lease payments
  - ☐ Parking costs
  - ☐ Repairs and maintenance

BUSINESS USE OF HOME

- ☐ Area of home used only for business (sq ft) _____
- ☐ Total area of home (sq ft) _____
- ☐ Expenses
  - ☐ Insurance (self-employed or commission only)
  - ☐ 100% office maintenance and repairs
  - ☐ Other maintenance and repairs
  - ☐ Mortgage interest (for self-employed only)
  - ☐ Property taxes (self-employed or commission only)
  - ☐ Security monitoring fees
  - ☐ Utilities

Tax payments deadline for all taxpayers is April 30, 2020